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ABSTRACT

Developed by industry representatives and educators for use by vocational instructors, this guide focuses on the tasks and competencies necessary for a student to develop in order to secure employment as a counterperson in automobile, agriculture, and truck parts. The task list is an outline of various skills and proficiencies and covers sales, instore merchandising, outstore advertising, communications, store layout, trade magazines, security, orders, tickets, forms, parts and equipment identification, services, inventory and stock, and miscellaneous topics. The competency record, a replacement for the traditional report card, lists student competencies to be checked upon accomplishment and relates directly to the skills found in the task list. A list of industry representatives involved in developing the task list and competency record is also included. (TM)

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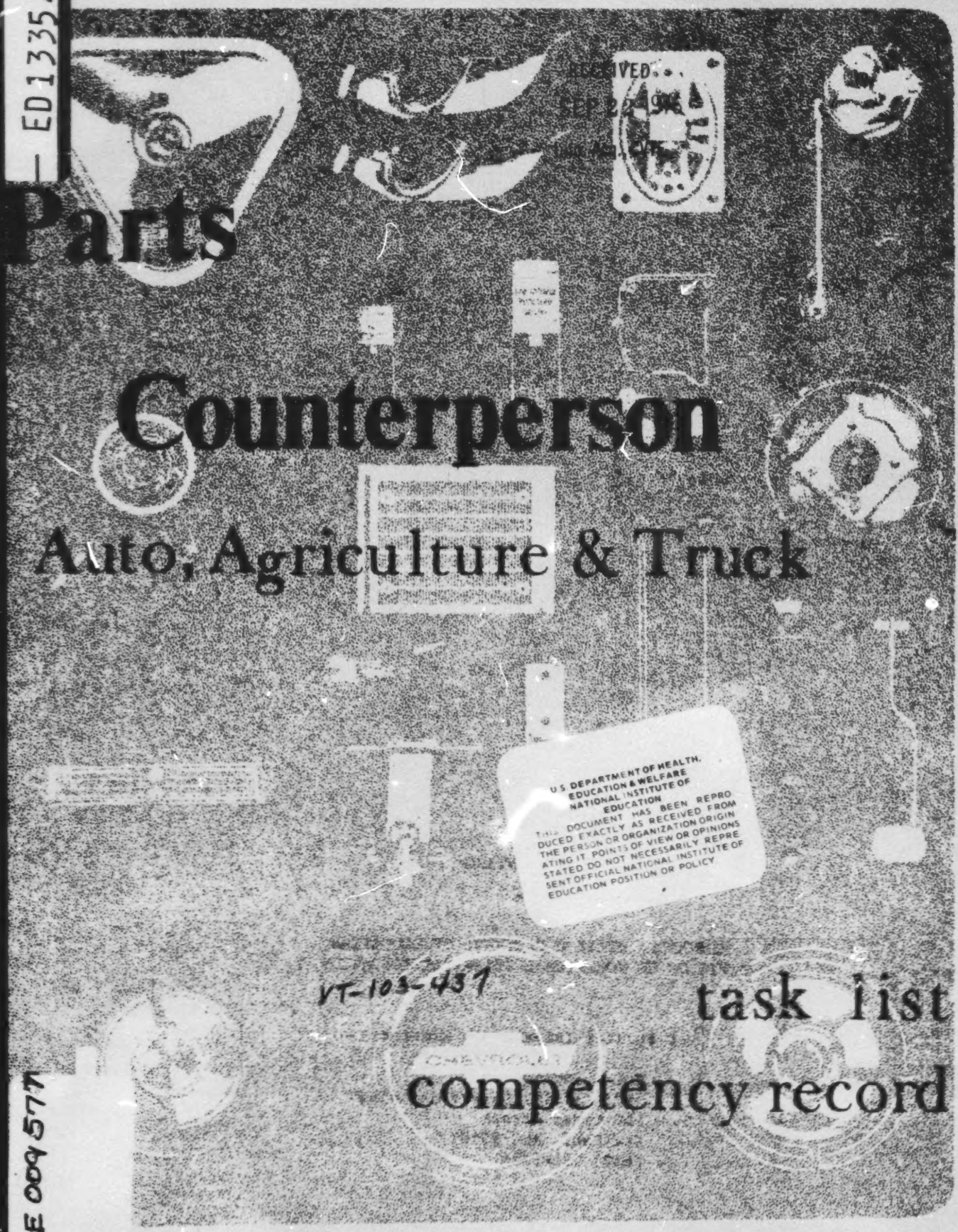

Parts Counterperson

Auto, Agriculture & Truck

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task list
competency record

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JOB DESCRIPTION

Counterperson - (DOT 289.358)
(Other common job title: Salesperson)

The Counterperson provides services for customers. He/she must develop skills in selling, stockkeeping, inventory, inventory control, and merchandising. This individual should have good mechanical aptitude, an understanding of engineering concepts and knowledge of catalogs and their uses. He/she is a research clerk, reference clerk, counselor to mechanics, information guide, salesperson, public relations specialist, and mathematician. Flexibility is required as the Counterperson must be able to adapt to functioning in the role of housekeeper, engineer, or salesperson at any given time.

Graduates of the Counterperson occupational program find employment in wholesale stores, auto/truck/agricultural machinery dealerships, warehouses, jobbers, and mass merchandising stores.

It is <u>not</u> assumed that he/she could be employed as the parts manager, credit manager, or merchandising manager without additional training and/or experience.

A student who has training in a <u>limited segment</u> of this occupational program may find employment in one of the following spin-off occupations: Shipping and Receiving Clerk, Stock Person, Machine Assembler (Agriculture).

TASK LIST

The following task list gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job. It was developed by industry representatives and educators throughout the State of Minnesota.

You will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgements must be made, by you, concerning amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

TASK LIST

I. SALES

A. Sells auto/truck/agriculture parts to customers in person

1. Relates to customer in a professional manner (appearance, knowledge, attitudes)
2. Uses salesmanship skills
3. Handles common customer complaints (refers others to manager)
4. Serves a public relations representative by using politeness and fair treatment
5. Demonstrates customer service skills

B. Sells related items to customers through use of suggestive selling techniques

C. Sells and promotes products by telephone

1. Uses the telephone in a businesslike manner
2. Handles the calling party courteously

D. Uses proper cash handling procedures for credit cards and check cashing

E. Uses proper procedures for making change

F. Uses the cash register

1. For receiving on accounts
2. For refunds

G. Uses proper procedures for handling credit requests (the counter-person is not the credit manager)

II. INSTORE MERCHANDISING (VERY IMPORTANT)

A. Creates displays (utilizing knowledge, practices, trends, and products)

B. Sets up displays to sell products, services

1. Seasonal floor displays
2. Seasonal window displays
3. Informational floor displays
4. Informational window displays
5. Point of purchase displays (impulse displays)

C. Incorporates security measures in creation and setting up of displays

1. Eliminates blind spots so displays are easily visible

D. Merchandises with regard to store traffic patterns, with counter as focal point

III. OUTSTORE ADVERTISING

A. Prepares advertisements to promote the purchase of auto/truck/agriculture parts and related items at a given shop

1. Radio
2. Newspaper
3. TV

B. Promotes sales by responding to the current changes and conditions in the market which creates customer demand

IV. COMMUNICATIONS

A. Communicates by phone

1. Takes telephone messages
2. Transfers incoming telephone calls

V. STORE LAYOUT

A. Utilizes available space and shelving to arrange stock on the basis of sales to

1. Customers (over the counter)
2. Service shops

B. Plans store layout based on . . . for the items

1. Convenience (whether over-the-counter or through shop)
2. Popularity (activity)
3. Space required (size of parts)

C. Makes the store as attractive and efficient as possible

1. Visual storage
2. Behind-the-counter storage

VI. TRADE MAGAZINES

A. Reads various trade magazines to keep current with the industry

1. Magazines pertinent to retailing
2. Magazines pertinent to merchandising and displaying
3. Magazines pertinent to stocking and handling
4. Magazines pertinent to management and accounting
5. Magazines pertinent to economics of the area

B. Reads and maintains file of all pertinent bulletins, flyers, etc. from suppliers

VII. SECURITY

A. Uses cash handling procedures which guard against company loss

1. Refunds
2. Credit slips
3. Discounts

B. Utilizes refund and credit policies posted, and established by management

C. Reports individuals who cause the business to loose money through

1. Dishonest exchanges and/or service requests
2. Pilfering

D. Shows honesty and loyalty to the business in handling

1. Money
2. Time

VIII. ORDERS TICKETS AND FORMS

A. Fills out and distributes counter tickets on all transactions

B. Voids counter tickets and accounts for them

C. Writes credits on counter tickets according to established policy (very important)

D. Computes sales tax

1. Long-hand method
2. Tax chart

E. Operates credit card program

F. Uses adding machine(s) to add, subtract, and multiply

G. Fills out and distributes repair orders

H. Interprets repair orders

I. Fills out and distributes miscellaneous forms

1. Requisitions
2. Purchase orders
3. Returns goods notices

4. Sublet tags
5. Lost sales slips
6. Petty cash vouchers
7. Warranties
8. Stock out slips
9. Special ordered parts

IX. PARTS AND EQUIPMENT IDENTIFICATION

A. Uses the appropriate index for manufacturers or suppliers dealt with

1. Weatherly Index System

B. Uses alphabetical, numerical or alpha-numerical system as required

C. Refers to sequence indexed parts catalogs for information and part numbers

D. Uses appropriate current parts catalog, bulletins, quick-reference manuals, supplements, or revisions to

1. Select part numbers
2. Select parts in over and under size
3. Perform cross referencing and interchanging
4. Refer to footnotes as to age, model, and serial number of the specific unit
5. Refer to abbreviations, codes, symbols, etc.
6. Use numerical listings
7. Find package quantities and returnable status

E. Operates microfiche reader

F. Identifies assemblies and components by name, function, and/or location as described by customer

G. Uses parts catalogs and diagrams to illustrate parts replacements

H. Uses special equipment to "make up" customer/shop parts requirements from bulk stock, such as,

1. Copper or steel tubing
2. Hydraulic hose
3. Coolant hose
4. Chain
5. Electrical wires, etc.

I. Identifies and selects bearings, seals, fittings, nuts, bolts, etc., as to size and grade desired for the particular application or part number

J. Uses special instruments to arrive at the sizes and dimensions needed to match the part to the customer's requirements, such as

1. Ruler
2. Micrometer
3. Hand Caliper
4. Dial Indicator
5. Depth Gauge
6. Fan Belt Gauge
7. Nut and Bolt Gauge

K. Identifies cores

X. SERVICES

A. Operates battery tester

B. Operates Graco Modular Fluid Commander

C. Mixes paint using paint codes and formulas (very important)

D. Labels mixed paints

E. Sublets repairs

F. Prepares schedule and route plan for pick up and delivery service (optional)

G. Picks up and delivers goods to customers following route plan (optional)

H. Machines brake drums on

1. Ammco lathe
2. Star lathe (optional)
3. John Beane lathe

I. Measures brake drums with micrometer (optional)

J. Grinds brake shoes on

1. Ammco lathe
2. Star lathe (optional)
3. John Beane lathe

K. Machines disc rotors on

1. Ammco lathe
2. Star lathe (optional)
3. John Bean lathe

L. Measures rotors with micrometer (optional)

M. Operates hydraulic press

1. Axle bearings
2. Piston pins (optional)
3. Specialty jobs

XI. INVENTORY AND STOCK

A. Orders parts in accordance with suggested ordering practices

1. Manual system
2. Automated system

B. Receives and stocks parts

1. Updates parts cards or availability sheets
2. Checks in parts and bins them
3. Reports stock shortages and overages, and corrects records
4. Uses established procedures for handling special ordered parts

C. Operates perpetual inventory control system, either manual or automated

1. Maintains proper daily records showing

a. Inventory quantity on hand
b. Quantity on order
c. Quantity received
d. Reorder point
e. Daily sales (to customer or shop)
f. Monthly, quarterly, and annual sales
g. Activity designation

2. Maintains proper controls to

a. Give good turnover
b. Give good customer/shop over-the-counter fill
c. Monitor obsolescence
d. Provide return on investment

D. Takes physical inventory on an annual basis

E. Handles core-exchange-warranty-recalls, etc., according to established procedures such as;

1. Identification
2. Verification of problem or defect
3. Paperwork covering transactions
4. Making sure they are returned
5. Tagging them properly for appropriate purposes and credit
6. Maintaining them in a specific area
7. Sorting and packaging them prior to return

XIV. MISCELLANEOUS

A. Doesn't forget who his/her employer is

B. Cooperates with other employees to promote the business

C. Always strives for improved performance and advancement

D. Maintains orderly store appearance

E. Maintains neat personal appearance

F. Demonstrates proper attitude

G. Writes legibly at all times

COMPETENCY RECORD

The competency record that appears in this section is suggested as a replacement for the traditional report card. It gives employers, students, parents and other teachers information about what each student can and cannot do. For example, on the competency record which follows, checkmarks could be given in the right hand column to indicate each of the competencies that a student has demonstrated. It is recommended that the instructor use the competency record as a record keeping device and that he/she refer back to the task list for more specific information about the tasks students should be able to perform when they receive credit for each competency.

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[1] Further explanation of how to use task lists and competency records is given in the orange booklet entitled "Competency Based Route to Vertical Curriculum Articulation". See page 19 if you wish to order a copy.

COMPETENCY RECORD
OCCUPATION: COUNTERPERSON
(Auto, Truck, Agriculture)

Name of Student_____ Instructor_____

Name of School_____

The checks on this competency record tell what this student has demonstrated that he or she can do. An advisory committee representing industries throughout Minnesota has assisted in establishing this list of what a student should be able to do as a worker in this occupation.

I. SALES	
A. Sells auto/truck/agriculture parts to customers in person	
B. Sells related items to customers through use of suggestive selling techniques	
C. Sells and promotes products by telephone	
D. Uses proper cash handling procedures for credit cards and check cashing	
E. Uses proper procedures for making change	
F. Uses the cash register	
G. Uses proper procedures for handling credit requests (the counterperson is not the credit manager)	
II. INSTORE MERCHANDISING	
A. Creates displays (utilizing knowledge, practices, trends, and products)	

B. Sets up displays to sell products, services	
C. Incorporates security measures in creation and setting up of displays	
D. Merchandises with regard to store traffic patterns, with counter as focal point	
III. OUTSTORE ADVERTISING	
A. Prepares advertisements to promote the purchase of auto parts and related items at a given shop	
B. Promotes sales by responding to the current changes and conditions in the market which creates customer demand	
IV. COMMUNICATIONS	
A. Communicates by phone	
V. STORE LAYOUT	
A. Utilizes available space and shelving to arrange stock on the basis of sales	
B. Plans store layout based on the items	
C. Makes the store as attractive and efficient as possible	
VI. TRADE MAGAZINES	
A. Reads various trade magazines to keep current with the industry	

B. Reads and maintains file of all pertinent bulletins, flyers, etc., from suppliers	
VII. SECURITY	
A. Uses cash handling procedures which guard against company loss	
B. Utilizes refund and credit policies posted, and established by management	
C. Reports individuals who cause the business to loose money	
D. Shows honesty and loyalty to the business	
VIII. ORDERS TICKETS AND FORMS	
A. Fills out and distributes counter tickets on all transactions	
B. Voids counter tickets and accounts for them	
C. Writes credits on counter tickets according to established policy	
D. Computes sales tax	
E. Operates credit card program	
F. Uses adding machine(s) to add, subtract, and multiply	

G. Fills out and distributes repair orders	
H. Interprets repair orders	
I. Fills out and distributes miscellaneous forms	
IX. PARTS AND EQUIPMENT IDENTIFICATION	
A. Uses the appropriate index for manufacturers or supplies dealt with	
B. Uses alphabetical, numerical, or alpha-numerical system as required	
C. Refers to sequence indexed parts catalogs for information and part numbers	
D. Uses appropriate current parts catalog, bulletins, quick-reference manuals, supplements, or revisions	
E. Operates microfiche reader to identify parts and equipment	
F. Identifies assemblies and components by name, function, and/or location as described by customer	
G. Uses parts catalogs and diagrams to illustrate parts replacement	
H. Uses special equipment to "make up" customers/shop parts requirements from bulk stock	
I. Identifies and selects bearings, seals, fittings, nuts, bolts, etc., as to size and grade desired for particular application or part number	

J. Uses special instruments to arrive at the sizes and dimensions needed to match the part to the customer's requirements	
K. Identifies cores	
X. SERVICES	
A. Operates battery tester	
B. Operates Graco Modular Fluid Commander	
C. Mixes paint using paint codes and formulas	
D. Labels mixed paint	
E. Sublets repairs	
F. Prepares schedule and route plan for pick up and delivery service	
G. Picks up and delivers goods to customers following route plan	
H. Machines brake drums	
I. Measures brake drums with micrometer	
J. Grinds brake shoes	

K. Machines disc rotors	
L. Measures rotors with micrometer	
M. Operates hydraulic press	
XI. INVENTORY AND STOCK	
A. Orders parts in accordance with suggested ordering practices	
B. Receives and stocks parts	
C. Operates perpetual inventory control system, either manual or automated	
D. Takes physical inventory on an annual basis	
E. Handles core-exchange-warranty-recalls, etc., according to established procedures	
XII. MISCELLANEOUS	
A. Doesn't forget who his/her employer is	
B. Cooperates with other employees to promote the business	
C. Always strives for improved performance and advancement	

D. Maintains orderly store appearance	
E. Maintains neat personal appearance	
F. Demonstrates proper attitude	
G. Writes legibly at all times	

IV REPRESENTATIVES

The following Industry Representatives were involved in the development of this task listing.

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The following publications are available to assist instructors in developing competency based instructional programs:

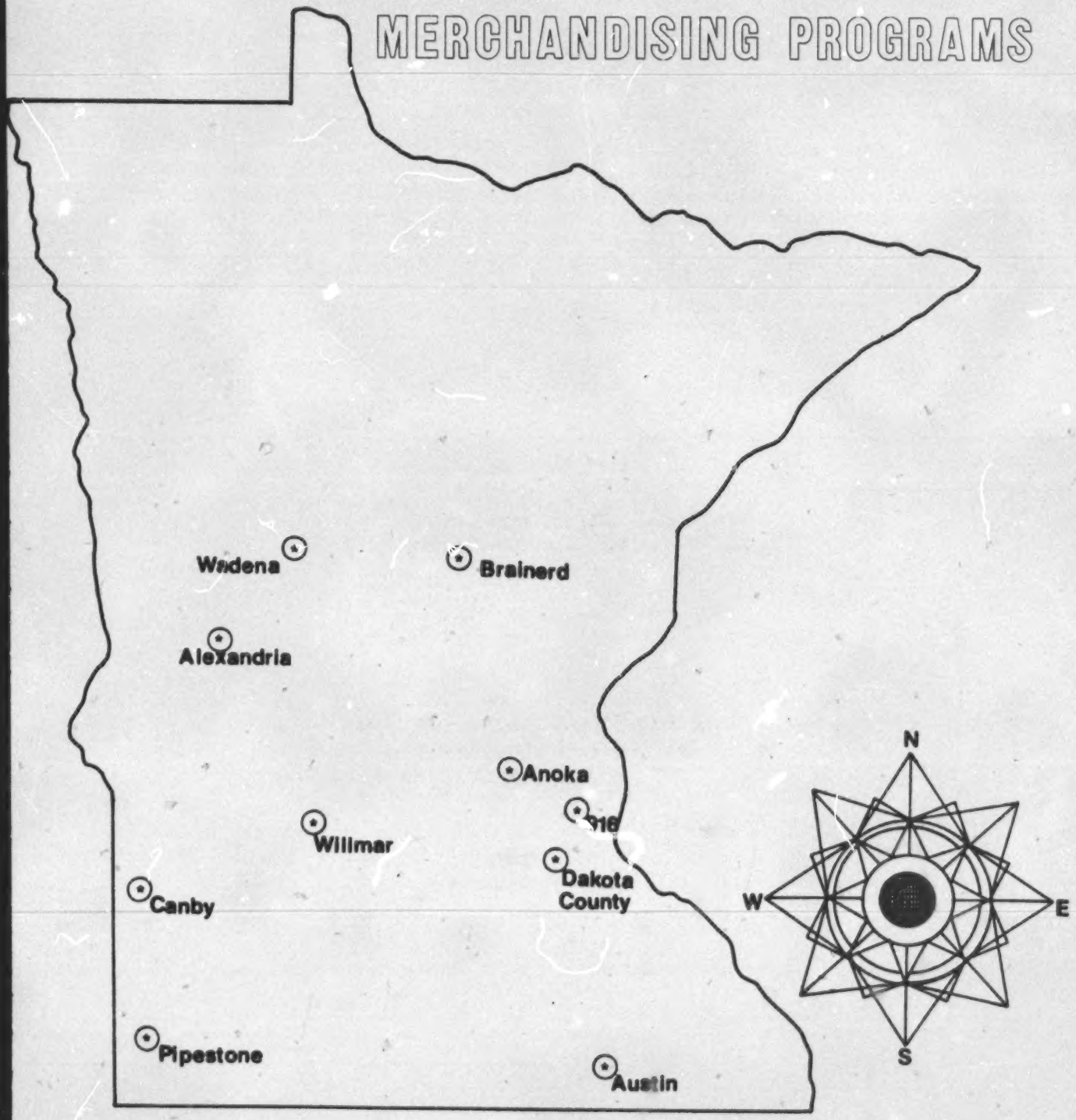
Handbook for Vocational Instructors Interested in Competency Based Education

Competency Based Route to Vertical Curriculum Articulation

These, and other materials which are being developed, can be purchased or ordered on loan from:

Minnesota Instructional Materials Center (MIMC)
916 Area Vocational Technical Institute
3300 Century Avenue
White Bear Lake, Minnesota 55110
Phone: 770-3943 or 800-652-9024 (toll free)

MINNESOTA PARTS - ACCESSORIES MERCHANDISING PROGRAMS



Alexandria AVTI	10 months
Anoka AVTI	9 months
Austin AVTI	10½ months
Brainerd AVTI	9 months
Canby AVTI	11 months
Dakota County AVTI	11 months
916 AVTI	10 months
Pipestone AVTI	11 months
Wadena AVTI	9 months
Willmar AVTI	10 months

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